



China Sling Industry Report, 2010-2011

July 2011

This report

- ◆ **Analyzes the development environment of sling industry in China**
- ◆ **Focuses on the upstream and downstream sector of sling industry**
- ◆ **Highlights the operation of key enterprises in China aslo investment of Foreign Enterprises in China**

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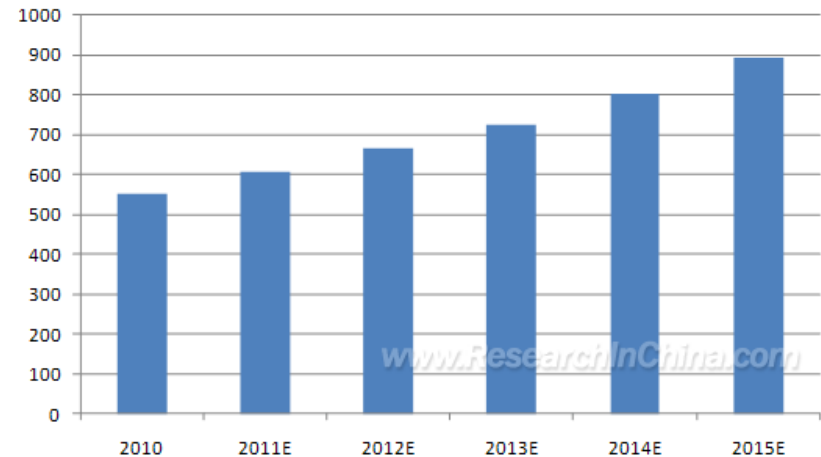
Abstract

Sling industry emerged in China in the 1990s and currently is in its introduction stage, featuring low prevalence of professional sling but huge demand potentiality. The market size of global sling industry approximates RMB100 billion, to which the Chinese market is estimated to contribute RMB30 billion. With the steady upgrading of China's industry and the pursuit of safe production and lean management, the demand for sling products, especially high-end sling products will increase year by year.

Take chain sling used in steel industry for instance, in the developed countries, figures show that every ton of lifting chain and chain sling will be required for producing around one thousand tons of crude steel. Considering 600 million tons of crude steel is produced per annum in China, the demand of chain sling in iron & steel industry will reach 600 thousand tons. However, there are only a few enterprises engaging in the manufacture of chain sling in China.

Additionally, sling product, as a kind of industrial consumable, has the features of being eliminated periodically and purchased repeatedly. Except the steel tie rod, most of sling products have 1-2 years working life, moreover, slings applied in ocean engineering and metallurgy can be used for only once.

Demand of Chain Sling in China, 2010-2015E



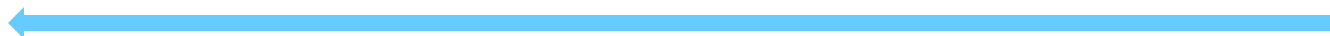
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Although there are numerous sling enterprises in China, they mostly focus on manufacturing low-end products but achieve limited sales and compete with each other fiercely in domestic market. Annual sales of most sling manufacturers registers between RMB500 thousand to RMB100 million and 40% of sling producers have not their own brands. As for high-end products with special requirements, manufacturers need to acquire qualifications and improve production technologies to satisfy the customers' need. Inasmuch as high-end sling products are in short supply in China, a great majority of the products relies upon imports.

In the western developed countries, sling industry has been out of focus and considered as a subsidiary industry for a long term. Yet, it is undergoing strategic transfer to the developing nations in the Asia-Pacific. Many overseas enterprises tapped into Chinese market. For instance, Dolezych founded DOLECO (Kunshan) Lifting and Lashing Ltd for manufacturing and marketing its products; Unitex set up Unitex Safety Equipment (Kunshan) Co., Ltd involved in producing and distributing products in China; WISCO WRCA, a joint venture established by WireCo Group and Wuhan Iron and Steel (Group)

Corporation, devotes itself to the production of high-end steel wire rope; WEISSENFELS Tech-Chains SPA cooperates with Jian Feng Sling and authorizes the latter as its exclusive agent for its chain and sling accessories products in Chinese Mainland, Hong Kong and Macao.

Meanwhile, Chinese local enterprises are striving for seizing the opportunity to expand their business. The fund-raising project of China JULI Group has been put into production with capacity releasing by degrees, and it will achieve its full capacity in 2012; and the company even plans to explore overseas markets and integrate upstream industry chain. Guizhou Wire Rope Incorporation Company launched technological reformation project and the large-diameter high-strength steel strand independently produced by the company successfully finds application in several national major projects. Ningxia Hengli Steel Wire Rope Co., Ltd speeds up the construction of 30-thousand-tons special steel wire rope project, expecting to improve its market share of high-end products.



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